

BANK SWITCH CHECKLIST

When you're ready to switch, use this checklist to help you with the process.

- List all your bill providers linked to your current account.
- Open the account at your new bank or credit union.
- Link all your online bills to the new account.
- Ask your new bank or your employer for a new direct deposit form, fill it out, and give it back to your employer.
- Verify that your first direct deposit is routing into the new account.
- Verify that your bill payments are being deducted from the new account.
- Search for any pending transactions on your current account and wait for them to post.
- Verify that any outstanding checks from your old account have cleared.
- Verify that your new checks and debit card have arrived.
- Contact your bank and request an account closure; ask if there are fees associated with your account.

GET MONEY